

Grants Online Competition Manager's Quick Reference Guide

The purpose of this document is to provide you with a process for creating and managing Competitions in Grants Online. Although the competitive application selections currently occur outside the Grants Online system, you are still required to create a Competition, which includes a Review Event during the competitive RFA building process. This document details the process that allows you to bring your external competition results into Grants Online.

I. Creating the RFA

- a. For each actual competition that you are running under your RFA, create a corresponding competition in Grants Online.
- b. Create a single "Independent Mail Review" review event as part of each competition.
- c. There is a link at the bottom of the Competition Details page entitled "Review Event." Click on this link to create a new Review Event.
- d. You can set the Review Event start and end dates to meet your needs. However, the Review Event **CANNOT** be set to begin in the past.

II. Managing the Competition It is important to note that at this point, **ALL** your paper applications must be entered in Grants Online and the minimum requirements checklist must be completed for each application.

At this point in time, the Program Officer should send electronic/paper based applications and reviewer instructions/criteria to the reviewers so that they can perform the review outside the system. The reviewer will then send the scored review back to the Program Officer. That scored review will be uploaded to Grants Online (see step d below).

- a. Seven days prior to the review event start date; the Program Officer will receive a task to "Confirm the review event." At this point in time, you can make changes to the review event start and end dates. If you are trying to expedite the process, set the review event end date to be a day or two after the start date (please note, neither the start nor the end dates can be set in the past). Once you are satisfied with the dates, complete the task to confirm the review event.
 - **Do not work on the task entitled "Assign Reviewers."**
- b. The next review event task you will work on is the task named "Close Out Review Event." Once you receive this task, select "Close Out" from the action dropdown on the task and click "Submit."
- c. The Competition Manager will now receive a task to "Select Applications." The Competition Manager will complete the task and forward it to the Selecting Official. For a Group Competition, **ALL** applications that are intended for funded should be selected (*See Note). The Selecting Official selects applications and identifies dollar amounts for those applications.
- d. Once the Selecting Official completes the action related to selecting applications, the Program Officer will receive a task to conduct negotiations. The following must be done as part of the negotiations:
 1. Generate/associate an Award Number with the application
 2. Associate the Applicant Organization with a known Grants Online organization
 3. Associate the Authorized Representative with a known Grants Online Representative

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The actual negotiations may be done here if desired, but if the applicants are not ready to provide necessary information, the actual negotiations can wait until a later step. The Program Officer will not have the option to forward the Application to the Competition Manager until these three items are completed. Once completed, the Program Officer will select "Forward to Competition Manager for Selection Package".

- e. After the **FIRST** negotiation is completed, the Competition Manager will receive the task: "Competition Manager Review Selection Package." At this point, attach all of the pertinent Selection Package Documents, e.g. Reviews, Conflict of Interest Forms, Rank Order of Applications, etc. **However, do not forward the Selection Package to the Selecting Official until ALL your negotiations have been completed.**
- f. The Selecting Official will review and approve the Selection Package by forwarding it to FALD for Review.
- g. FALD will review the Selection Package. If they are satisfied with the Package they will initiate Award File workflow by choosing the "No Legal Objection" option. This will generate an Award File with a PO Checklist, a NEPA document, and a Procurement Request for every selected application. Corresponding workflow for each document will also be generated.
 - If FALD has issues with the Selection Package, they may return it to the Selecting Official with the action: "FALD Comment." The Selecting Official has a choice of following or not following any advice that FALD presents, but must send the Selection Package back to FALD where they will choose the "NoLegalObjection" workflow option even if they have a legal objection.
- h. The Program Officers assigned to each of the Award Files will complete the Award File documents for which they are assigned workflow tasks. To continue negotiations on an Application, the Program Officer must first Complete and Certify the PO Checklist. They will then get a task to "Certify/Revise the Award File." At this point, they can choose to renegotiate the Application. The Program Officer may also come back to the PO Checklist for re-work at any time prior to sending the Award File to GMD for processing.
 - During renegotiation (or recertification), the Program Officer may have the option to "Forward to CM for Review". If this shows up, it is a system error. **DO NOT choose this workflow option.** Doing so will kill the workflow which the Help Desk will have to restart.
- i. During the entire selection and approval process, the Competition Manager will have an additional workflow option of "Select Applications" under the Competition Launch Page. This is not a task (i.e. it will not be in the task inbox), but a global workflow option, to allow Competition Managers to select additional applications for funding (*See Note). Each time that this option is chosen and additional applications are selected for funding, the entire selection process must be repeated for the newly selected applications.

***Note:** Every time a Selection Package is created, it must be reviewed by FALD. For a Group Competition, there should only be one Selection Package, which should only be reviewed one time by FALD (assuming no legal objections). Only in exceptional circumstances should a Group Competition generate a second Selection Package, e.g. a change in funding availability which allows more (or less) applications to be funded, a selected application withdraws and needs to be replaced, etc. For a competition, which needs to remove applications for re-review by FALD, please contact the Help Desk.

Should you have any questions regarding this process, please contact the Grants Online Help Desk at 301.713.1000, or via email at grantsonline.helpdesk@noaa.gov.